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February 15, 2011

## **AGENDA ITEM 6a**

### **TO: MEMBERS OF THE BENEFITS AND PROGRAM ADMINISTRATION COMMITTEE**

- I. SUBJECT:** Member Branch Performance Measures
- II. PROGRAM:** Member and Benefit Services Branch
- III. RECOMMENDATION:** Information Only
- IV. ANALYSIS:**

Attached are the FY 2010-2011 Second Quarter Member and Benefit Services Branch (MBSB) Performance Management dashboard reports. The summary status report from the most recent quarter is provided as Attachment A. The dashboard reports for the most recent quarter are provided as Attachment B. Some metrics are not on target due in part to our most experienced staff being redirected to Pension System Resumption Project activities and continued high workload volumes.

Customer Service and Education Division (CSED) reports five dashboards for performance measures related to customer service and telephone contact, Attachments B-1 through B-5. Attachments B-2, call answer rate, and B-3, average wait time, have improved from red to green. High call volumes continued in the second quarter, with Open Enrollment and Annual Member Statements impacting our ability to meet service levels during October and November. In December, the end of state furloughs increased staff availability, thereby improving our ability to meet customer needs and allowing us to meet our goals.

Member Services Division (MBSD) reports six dashboards for performance measures related to service credit cost requests, elections to purchase service credit, and retirement estimates, Attachments B-6 through B-11. Attachments B-6 and B-7 relate to service credit cost requests. Cost requests are processed on a first-in, first-out basis. Attachment B-6, percent of service credit cost requests completed, improved to green. Attachment B-7, number of requests completed within 90 days, remained red due to the accumulated backlog. Once the backlog is eliminated, this measure should improve. The end of furloughs and increased training of part-time staff has increased productivity (see Attachment B-6a).

Attachment B-10 shows the percentage of retirement estimate requests completed within 5 days of receipt. This measure remains yellow, decreasing slightly to 81 percent. Attachment B-11, the percentage of retirement estimate requests completed within 30 days of receipt, remains green. The staff completion rate was 99 percent, representing the fourth consecutive quarter of 97 percent or greater completion rate.

Benefit Services Division (BNSD) reports seven dashboards for performance measures related to service and disability retirement, adjustments, pre and post retirement death benefits, and refunds, Attachments B-12 through B-18. During the second quarter, service retirement allowance adjustments, Attachment B-13, changed from green to yellow. Unprecedented increases in incoming service retirement applications and associated payments in prior quarters negatively impacted our service level for adjustments. Disability retirement determinations, Attachment B-17, remained green for the second consecutive quarter, meeting our service level target. We will continue to monitor workload for sustained performance as more focused attention is directed to the Pension System Resumption Project over the coming months.

**V. STRATEGIC PLAN:**

This project supports the CalPERS Strategic Plan. The performance measurements described in the attachments are directly aligned to the CalPERS strategic goals.

**VI. RESULTS/COSTS:**

These Performance Management dashboard reports were implemented in MBSB effective the fourth quarter of fiscal year 2006-07 to replace MBSB Effectiveness Measures previously reported to the Board. There are no new costs associated with the implementation and administration of the new Performance Management process.

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Member and Benefit Services Branch

Attachments